

CASE INFORMATION MANAGEMENT PROJECT (CIMP)

JustWare Administration/User Support

Update Provided to the
MONTANA PUBLIC DEFENDER COMMISSION
April 18, 2008

User Support/Implementation Issues Identified

- **System Response Time**
 - Speed has been greatly improved. Users are reporting system response times are well within the acceptable range.
- **User Satisfaction**
 - User reports are showing a great increase in basic user satisfaction. JustWare's response times, new updates, new features are being reported as beneficial and improved. Overall users are becoming more and more at ease with the system.
- **Data Clean Up**
 - Data clean up is also progressing quickly. Overall data is roughly 85% accurate and "clean." As before, new data is being spot checked and looks good. Valid data is also being verified through reports.

Ongoing Implementation Projects

- **Data Clean Up**
 - Data clean up should be considered an on-going project. In general all data clean up issues have been identified and are being corrected. Currently there are no "unknown" cases remaining from the conversion (this number has gone from 2200 to zero in about 10 days).
 - It is anticipated that all identified issues shall be corrected and valid data in place by June 1, 2008.
 - FTE cases are being cleaned to reflect OPD standards for case status
 - Contract/Conflict cases are being cleaned to reflect case status and attorneys assigned.
- **User Support Position - Short Term Worker**
 - Additional JustWare support has been achieved by the use of a short term worker. This position includes direct user support, data clean up, and follow up training.
- **Staff support**
 - Direct user support is being accomplished through office visits and live remote support. A JustWare support email address will be set up for all JustWare related issues, concerns, questions, and training requests.

- **Follow up Training**
 - Office visits are providing follow-up training as needed. Sites in Helena, Kalispell, Polson, and Missoula have already been visited. Billings and Eastern Montana are being scheduled.
 - A regular training/support calendar will be implemented.
- **Documents/Reports**
 - Automated system-generated documents have been tested for functionality and form. Currently, there are approximately ten documents installed and operational. Remaining documents defined in the contract scope of work have been identified and are in development. Training and roll-out of new documents will be provided to users.
 - Automated system-generated reports are being developed and tested. These are the reports that have been defined in the contract scope of work. Training on all reporting services will be provided to users.
- **Test Group**
 - Currently a test group of users is being formed, which will be made up of a variety of users. The functionality of this group will be to test any new updates and additions as they become available. Now that the system stability is at acceptable levels, this group will help to facilitate the smooth transition of new features added. The group will test such additions as time tracking, Outlook integration, documents, and reports.

Future Implementation Projects

- **Data Partitioning**
 - With data partitioning access to case and name information can be controlled based on security profile or agency. Some data partitioning is currently in place but some “fine tuning” is necessary.
- **Focus Group**
 - The Case Information Management Project Team (CIMP) should conduct a follow-up of the contract scope of work and progress made in achieving the desired goals. The follow-up team should consist of previous members as well as new members to accommodate for staffing changes.
- **Time Tracking**
 - The Time Tracking functionality is complete, installed and ready for testing. The aforementioned testing group will be trained and set up to complete the testing phase.
- **Outlook Integration**
 - JustWare events, correspondence, and tasks can now be synchronized with Microsoft Exchange appointments. The Exchange Synchronization Service is a feature that synchronizes

JustWare's name calendar and a Microsoft Exchange server. Depending on settings, appointments in Exchange are added to the appropriate name calendars in JustWare and events, correspondence, and tasks from JustWare are added to Exchange. The aforementioned testing group will be trained and set up to complete this testing phase.

- **User Manual**

- A JustWare/OPD User manual will be developed to replace the previous training materials. This manual will be standard and distributed statewide. Use of the short term worker will help to accomplish this project. Input from the CIMP team will also be considered. The manual will include instruction on all levels of JustWare access from data entry to read only.